

## Creating & Managing Website Users

There is an area within the eGov Manager that allows you to create and manage users for your website. This guide will help you configure users and add members to your website's staff directory.

### Logging In

#### Log In to the eGov Manager:

To set up Social Media in the eGov Manager, you will first need to log in. Simply add **/manager** to the end of your website's URL. The URL you see below will lead you to where you can sign in to your eGov Manager. Please note: the URL below is a sample.

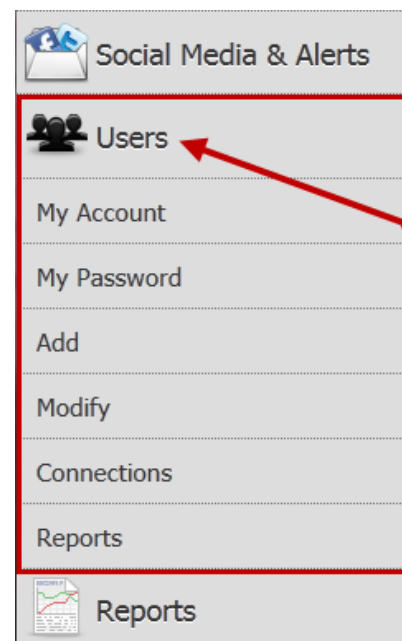
**eGov Manager:**     <http://websiteaddresshere.com/manager>

### Locate the User Directory

1. To begin adding users to your website, you will click **Users**, which is located on the left side of your screen in Manager's sidebar. The menu will expand, providing you with multiple options.

- a. **My Account:** This is where users can click to edit their account information.
- b. **My Password:** Users can change their passwords here.
- c. **Add:** This is where new users are created.
- d. **Modify:** Where you can edit existing users and their Department affiliations.

**Note:** Please ignore Connections and Reports – this is future technology that will be incorporated at a later date.



To begin adding users, click **Add**. By default, you will begin with the **General** tab.

2. Keep the **Status** set to **Active**, and eGov User set to No. This is only applicable to eGov Staff.
3. Next, select the **User Group**.

The screenshot shows the 'Add User' form with the 'General' tab active. The 'User Group' dropdown menu is open, displaying a list of roles: Project Manager, -- Select a User Group --, Webmaster, Project Manager, Administrator, Content Provider, No Manager Access, and Registered Guest. The 'Status' field is set to 'Active' and 'Is eGov User?' is set to 'No'.

## User Access Levels

**You must select an access level for each user.**

The table below outlines each access level, complete with a description.

### eGov Manager Access Levels

Level	Description	Set By	Number
<b>Webmaster</b>	Can modify all aspects of the system and view all records and services.	eGov Strategies	1 per Client
<b>Project Mgr</b>	Can modify all aspects of the system, excluding the site look and feel. Can view all records and services.	Webmaster	2-3 per Client (core web team)
<b>Administrator</b>	Can modify aspects of the system directly involving content creation and management. Cannot modify "structural" elements such as departments-divisions. Has limited user administration privileges.	Webmaster & Project Mgr	Generally 1 per Department
<b>Content Provider</b>	Primarily limited to content management functionality within assigned department.	Webmaster, Project Mgr & Administrator	Unlimited
<b>No Manager Access</b>	Primarily used for individuals who should be in the Staff Directory but who do not need to make changes to website content.	Webmaster, Project Mgr & Administrator	Unlimited

## Name & Title

4. Once you have selected the appropriate **User Group**, you will enter the user's active **email address** and create a **user name**. We suggest using the first initial and full last name of the user.
5. Leave the **Authentication Method** on **eGov Manager**.
6. Next, create a **password**. Please follow the password requirements. We suggest using a static password for all users, which should be changed by the user personally once they are granted access to the eGov Manager.

<b>Email Address</b> *	jsmith@egovstrategies.com
<b>Username</b> *	jsmith
<b>Authentication Method</b> *	<input checked="" type="radio"/> eGov Manager <input type="radio"/> LDAP
<b>Password Rules</b>	Passwords must be at least 6 characters long and contain at least one letter and either one or more numbers or special characters.
<b>Password</b> *	••••••••
<b>Confirm Password</b> *	••••••••

7. While entering the user's First, Middle, and Last Name is not required, it is important to enter this information upon setting up a user account.

- a. Enter the user's **name** (at least the first and last).
- b. Change the **Public Email Display** as necessary.
- c. Optional – enter the user's official **title**, both employment and academic.
- d. Required – select the appropriate **gender**.

## Name & Title

<b>First Name</b>	Jane
<b>Middle Initial</b>	
<b>Last Name</b>	Smith
<b>Preferred Name</b>	
<b>Public Email Display</b> *	<input checked="" type="radio"/> Same as Above <input type="radio"/> Display Different Email to Public
<b>Public Email Address</b> *	jsmith@egovstrategies.com
<b>Title</b>	Environmental Health Specialist
<b>Professional / Academic Title (eg, PhD, JD, etc)</b>	PhD
<b>Gender</b> *	<input type="radio"/> Male <input checked="" type="radio"/> Female

## Access Permissions

As a courtesy prior to your website's launch, eGov will configure the initial website users, which includes the website's Project Manager or Administrator. The PM or Admin can then add more users as necessary, or give specific users the ability to add users for their own departments.

Depending on the access level set for the user, the options for Access Permissions will change. Some levels (Administrator and Content Provider) will require Application Access to be updated.

Refer to the **User Access Levels** earlier in this document for more information, although a short example is provided below for convenience.

If the user is set as...

- **Webmaster:** able to modify any area of the eGov Manager.
- **Project Manager:** able to modify any area of the eGov Manager, except design aspects.
- **Administrator:** able to modify and create content; has limited admin privileges.
- **Content Provider:** limited to providing content for their assigned department.
- **No Manager Access:** reserved for users who will only be listed within the Staff Directory.
- **Registered Guest:** a guest of the website; can submit Action Center items, etc.

For the purposes of this guide, Jane Smith will **not** have manager access.

8. Select the user's appropriate **Department** or **Division** and click **Close List** to collapse the list.
9. Click **Save and Continue** to save your changes.

**Access Permissions**

Departments / Divisions Close List Select All Select Parent Items Clear All

- ☐ Fire Department Select Child Items Clear All
  - ☐ About Us
  - ☐ Gaming Select Child Items Clear All
  - ☐ Licenses
- ☒ Health Department
- ☐ HR office Select Child Items Clear All
  - ☐ HR Office
- ☐ Mayor's Office Select Child Items Clear All
  - ☐ Garage Sale Permits

The user has now been created and is visible in the eGov Manager's User List.

**Note:** the screenshot below of the User List has been edited to directly show the user's entry.

**Access Permissions**

Departments / Divisions Edit List

- ☒ Health Department

Users 1-49 of 49

Edit	Delete	Pwd	Status	ID	User	Email	Type	Usergroup	Last Login	Created On	By	Modified On	By
			Active	755	Smith, Jane	jsmith@egovstrategies.com	Staff	No Manager Access		04/02/13	DU	04/02/13 14:24	DU

**Note:** When adding users, it is important to understand the specific Application settings that go along with setting a user as Administrator or Content Provider. It will be up to the Primary Web Steward (Webmaster) to create users and configure application access – directions to do so will be given to that person when the time is appropriate.




## Adding Contact Information

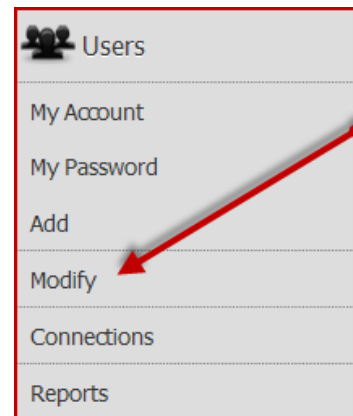
You may have noticed while creating a user that there are multiple tabs from which you can select. When adding a user, you can simply skip clicking Save and Continue, scroll back to the top, and navigate through those tabs without losing your changes.

Some opt to add the user's contact information and associate them with the appropriate staff directory when creating the user, but it is possible go back later and modify the user to include their specific information. This guide will follow that route and modify the user after the entry is created.

1. Under the Users tab on the left sidebar, click **Modify**.
2. Find the user in the list and click **Edit**.

Users 1-49 of 49

Edit	Delete	Pwd	Status	ID	User
			Active	755	Smith, Jane



3. Click the **Contact** tab under **Users: Modify User**.



4. Now, you can enter the user's telephone number and primary address. To get started, simply click **Add** under Telephone Numbers.

General Contact Subscriptions e-Billing Staff Directory

### Telephone Numbers

[Add](#)

Modify	Delete	Type	Number	Display to Public	Primary
None Found					

5. Select the phone number type from the drop-down menu. In most cases, you will use **Office**.
6. Enter the **primary phone number** of the user.
7. If you want this user's information to be public on the website and it is their primary phone number, be sure to select **Yes** for both **Display to Public** and **Primary**. Click **Add**.

General Contact Subscriptions e-Billing Staff Directory

### Telephone Numbers

Type \* Office

Number \* 317-555-3641 ext

Display to Public \* ☒ Yes ☐ No

Primary \* ☒ Yes ☐ No

Cancel Add

**Note:** If you leave **No** selected, the user will not be shown on the public side of the website, nor will their phone number be visible.

You will follow the same format for adding the primary address.

8. Click **Add** under Addresses to get started.

### Addresses

Add

Modify	Delete	Address Name	Address	Display To Public
None Found				

Here, you have a few more options. Depending on the **Address Type**, you will either **manually enter the user's address** or **select it from the list of locations** that have already been configured in the eGov Manager. For this guide, Jane Smith's office is located in City Hall, which is a location that is available in the drop-down menu.

9. Starting with **Address Name**, make your selection from the drop-down menu. In most cases, you will select **Physical**.
10. Select the radio button for **Location/Facility**.
11. Choose the **location**, and select **Yes** for **Display to Public**.
12. Click **Add** once you've made your changes.

### Addresses

Address Name \* Physical

Address Type \* ☒ Location / Facility ☐ Address ☐ Intersection

Location / Facility \* City Hall

Display To Public ☒ Yes ☐ No

Cancel Add

Congratulations, you now know how to create a user and add their contact information.

The next sections of this guide will discuss the remaining tabs within the Modify User section, but are not required when creating a user.

## Configuring User Subscriptions

If your website has eNotify, this is where you can allow people to sign up for list subscriptions. This feature may not be applicable; however, if you have eNotify built into your website, you can configure user Subscription settings within this tab.

1. To configure a user's Subscriptions and eBilling information, click **Modify** under **Users** on the left sidebar of the eGov Manager.
2. Click the Subscriptions tab.
3. Leave **Email Preference** as **HTML** (unless your user specifically can only receive Text email messages).
4. Leave **No** selected for **Allow SMS**.

Here, you are able to make decisions about how users will be notified of their selected subscriptions. Let's give Jane Smith a subscription to **Agendas & Minutes** within the **Subscriptions List**.

5. Check the box under **Email** on the left to make your Subscription selection.
6. Once you've made your selections, click **Save & Continue**.

The screenshot shows the 'Modify User' interface with the 'Subscriptions' tab selected. The 'Email Preference' is set to 'HTML' and 'Allow SMS?' is set to 'No'. A table lists various subscription categories with checkboxes for 'Email' and 'SMS'. The 'Agendas & Minutes' row has the 'Email' checkbox checked. Red arrows point to the 'Email' checkbox and the 'Save & Continue' button.

List	Email	SMS
<b>Agendas &amp; Minutes</b>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<b>Council Updates</b> Receive email notifications about City Council meeting agendas, minutes and changes in meeting dates.	<input type="checkbox"/>	<input type="checkbox"/>
<b>eGov Manager System Updates</b>	<input type="checkbox"/>	<input type="checkbox"/>
<b>eGov Test - June 2012</b>	<input type="checkbox"/>	<input type="checkbox"/>
<b>New List</b>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Parks and Recreation - News and Notifications</b> News and notifications about Parks and Recreation.	<input type="checkbox"/>	<input type="checkbox"/>
<b>Press Releases</b>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Test list for the list test</b>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Test Upload List</b>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Winter Emergency Snow Alerts</b>	<input type="checkbox"/>	<input type="checkbox"/>

Buttons: Cancel, Reset, Save & Continue

The user will now be subscribed to any **Agendas & Minutes** updates added to the website.

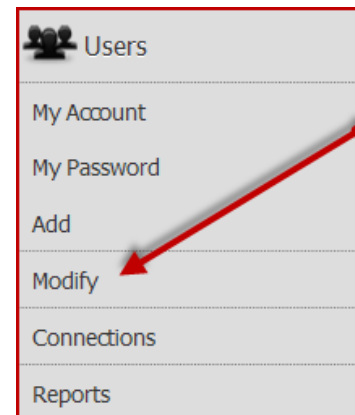
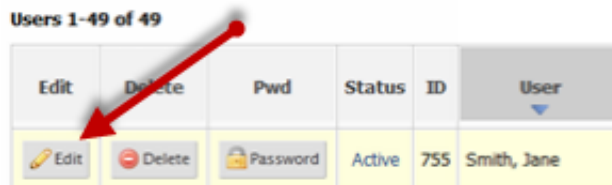
## Configuring e-Billing

Depending on the services your website has in place, the **eBilling** tab under **Manage Users** may not appear. If you have eBilling services, this is where you can go to configure settings for specific users.

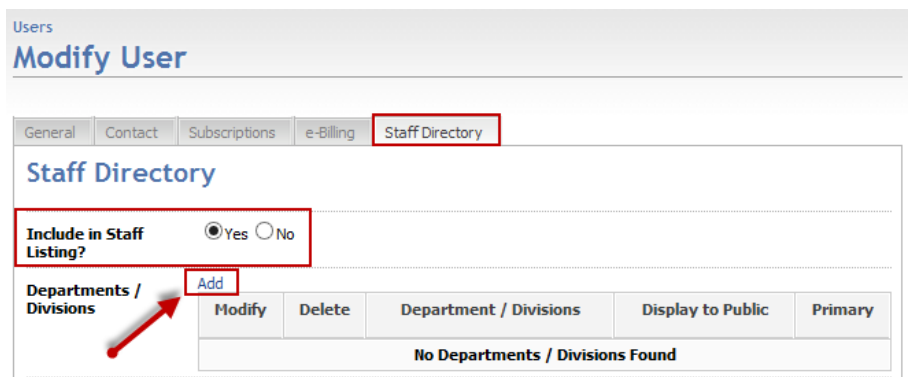
## Adding Users to a Staff Directory

In addition to adding users to your website, you can also configure them to appear in your website's Staff Directory.

1. Under the Users tab on the left sidebar, click **Modify**.
2. Find the user in the list and click **Edit**.



3. Click the **Staff Directory** tab.
4. To include the user in the staff directory listing, select **Yes**.
5. Click **Add** to configure the user's appropriate Department or Division.

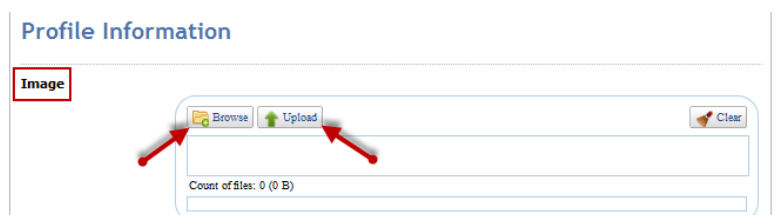


6. Select the **Department or Division** from the drop-down menu. Since Jane Smith works for the Health Department, we will select that.
7. Select **Yes** for **Display to Public** if you would like the user to appear in the website's Staff Directory.
8. Select **Primary** if this user is the **Primary Contact** of the Department. In this case, Jane is the primary contact.



Next, you have the ability to add in specific information about the user, including a **photo**, a **biographical sketch**, or **professional profile**.

For the purposes of this guide, we will skip adding a user photo, but if you would like to do so, simply select **Browse** under **Image** and select your photo and then **Upload**.





Most users opt to add a **Professional Profile**.

9. Add a small blurb about the user in the empty text box under **Professional Profile**.

The screenshot shows a web form for editing a profile. At the top is the 'Biographical Sketch' section with 'Browse' and 'Upload' buttons and a 'Clear' button. Below it is the 'Professional Profile' section, which has a rich text editor. A red box highlights the 'Professional Profile' label, and a red arrow points to the text area. The text area contains the following text: 'Jane Smith is the Environmental Health Specialist for the City. She studied at Indiana University and has been working with the City since 2002.' The text area also shows a toolbar with various formatting options and a '<BODY>' tag at the bottom.

The next area, **Status Message**, is where users can set an automatic message to appear on their profile within the Staff Directory. Users can choose when to start and stop showing an automatic message. This can be used to inform citizens of when a user is out of the office on vacation, or if they are unavailable for a specific date and time.

For the purposes of this guide, we will set an out-of-office status message for Jane Smith, so users know she may not respond during a specific time.

10. Click the **small calendar icon** to configure the **start and stop dates** of the Status Message.

*The time will automatically update to the current time of entry, so be sure to make changes as necessary.*

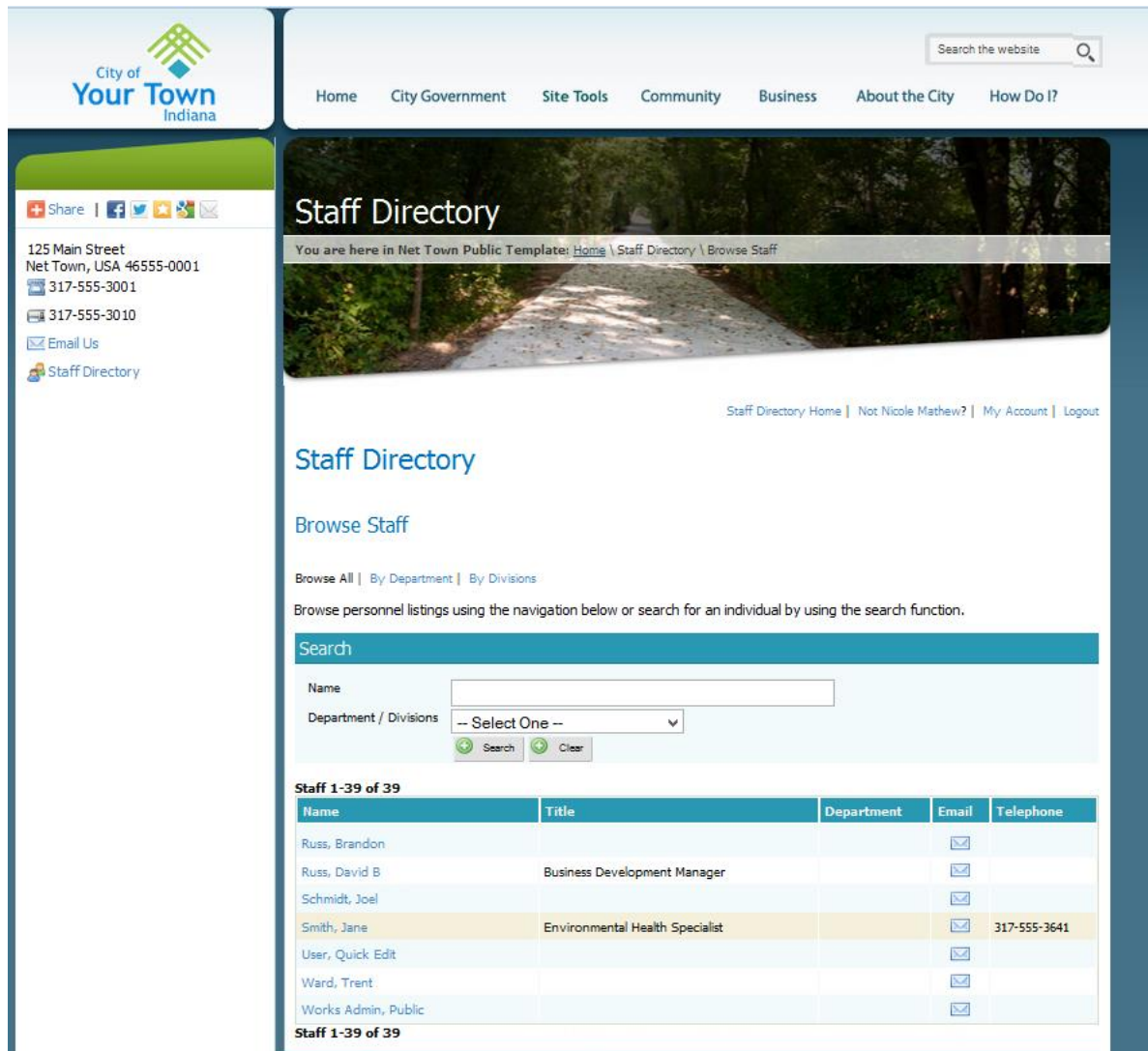
11. Enter the status message contents in the empty **Message** box.
12. Click **Save & Continue** once the changes have been made.

The screenshot shows the 'Status Message' configuration form. It has two rows for 'Start Showing Message' and 'Stop Showing Message'. Each row has a date field, a time field, and a 'Clear' button. A red box highlights the date and time fields, and a red arrow points to the 'Start Showing Message' date field. Below these fields is a 'Message' section with a rich text editor. A red box highlights the 'Message' label, and a red arrow points to the text area. The text area contains the following text: 'I will be out of the office for a Health Department Retreat and will not be able to respond to email messages or phone calls. I will return on the morning of April 15.' The text area also shows a toolbar with various formatting options and a '<BODY>' tag at the bottom. At the bottom of the form are three buttons: 'Cancel', 'Reset', and 'Save & Continue'. A red arrow points to the 'Save & Continue' button.

Now, let's take a look at how the information may appear on the public-facing side of your website.

## Locating Users on the Website

To begin, visit your website and locate your Staff Directory. The screenshot below is an edited version of the eGov Demo site and showcases how users appear in the website's Staff Directory. Not all websites and their staff directories will look exactly the same, so please keep that in mind.



To begin, visit your website and locate the **Staff Directory**.

1. We want to find our specific user, Jane Smith, so we type her name into the **Search** box. You do not need to select a Department/Division.
2. Click **Search**. You will see Jane Smith's information in the results. Click her name to view the complete entry.

This image shows a close-up of the search function and the resulting table. The search box has 'Jane Smith' entered in the 'Name' field. The 'Department / Divisions' dropdown is set to '-- Select One --'. The 'Search' button is highlighted with a red box and a red arrow. Below the search function is a table with one row, which is also highlighted with a red box.

Name	Title	Department	Email	Telephone
Smith, Jane	Environmental Health Specialist		✉	317-555-3641

Below, Jane Smith's profile is displayed, complete with her title, current status message, address, phone number, email address, primary department, and professional profile.

## Staff Directory

### Details

### Jane Smith, PhD Environmental Health Specialist

**My Status:**

I will be out of the office for a Health Department Retreat and will not be able to respond to email messages or phone calls. I will return on the morning of April 15.

**Office** 317-555-3641**Email** [jsmith@egovstrategies.com](mailto:jsmith@egovstrategies.com)**Physical Address** 200 W Washington St  
Indianapolis, IN 46212**Primary Department:** Health Department

### Professional Profile

Jane Smith is the Environmental Health Specialist for the City. She studied at Indiana University and has been working with the City since 2002.

Congratulations! You now know how to create a user within the eGov Manager and locate the user on the public-facing side of your website. If you have questions or need additional assistance, please email our Support team: [support@egovstrategies.com](mailto:support@egovstrategies.com).